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agricultural situation

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PLAUDITS FOR PRODUCERS



PLAUDITS FOR PRODUCERS

Farmers win plenty of praise from the general public—even when that public is not particularly happy over prevailing food prices.

At the height of consumer concern over food costs last fall, a special study of the public's opinions regarding farmers, food, and agriculture was conducted for PACER, Inc., a nonprofit corporation made up of the Nation's six leading professional agricultural communicator organizations. The study was funded by USDA's Office of Communication.

Over 2,000 in-home interviews were conducted with people in all parts of the country. Farm and nonfarm, rural and urban residents were included in the survey according to their representation in the total U.S. population.

The Farmer's Image

The general public gives farmers a real pat on the back for being harder working, more friendly and helpful, more productive, more concerned about the environment, and more protective of the environment than the average nonfarm person. At top right is a breakdown of how people regard farmers on 11 characteristics:

Farmers versus nonfarmers: Percent of people who say:

	Yes	No	Same	No opinion
Harder working	68	6	23	3
More protective of environment	55	7	35	3
More concerned about environment	53	11	33	3
More friendly and helpful	50	4	43	3
More dependent on government	49	20	27	4
More productive	48	22	27	3
More dependable	42	6	49	3
More active politically	29	32	35	4
More powerful politically	22	33	41	4
More prosperous	21	51	24	4
More liberal politically	15	52	28	5

One major misconception held by the general public regards farmers' prosperity. Nearly half (45 percent) think farmers are as well or better off financially than nonfarmers. Truth of the matter is, the per capita disposable income for farm people from all sources only reached 93 percent that of nonfarm residents in 1973, a record year for farm income. In the 1960's the average income of farm people was only about 67 percent as much as for nonfarmers. So far in the 1970's it has averaged 82 percent.

Food Costs: Facts and Fancies

The general public's beliefs about food prices are a blend of facts and fancies.

Four out of five people correctly assume food prices were the fastest rising component in the cost of living index during the first three quarters of 1973. But for the preceding 10-year period the tendency was to overestimate the food price rise and underestimate the gains for other items. For example, two out of five people think food prices rose faster than nonfood prices during 1962-72. In reality, housing and medical cost increases both outstripped the 37-percent rise for food.

Despite their perception of rapidly rising food prices, consumers generally don't feel farm prices are excessive. In fact, fewer than two in 10 people say farm prices were too high in 1973. In contrast, three in 10 feel that the prices farmers received in 1973 were too low and half believe farm prices were too low in the previous 10-year period.

The general public thinks the farmer gets far less of the consumer's food dollar than is actually the case. The consensus among

consumers is that farmers receive only about 25 cents of the food dollar, with the other 75 cents going to processors, wholesalers, and food stores. USDA estimates show, however, that during the first 9 months of 1973 the farmer's share was 45 cents. And for the 1962-72 period farmers got an average of 39 cents.



What's Back of Rising Food Prices?

Inflation and rising farm costs, plus food exports, figure as the major factors in 1973 food prices in the minds of consumers. Out of 20 possible explanations, these three were considered by a majority of the public to be the major reasons why food prices were higher in 1973 than a few years before. Farmers and farm organizations receive comparatively little blame for last year's food price levels. Here's a detailed listing of the public's feelings:

**Probable cause of prevailing
food prices:**

Percent saying:

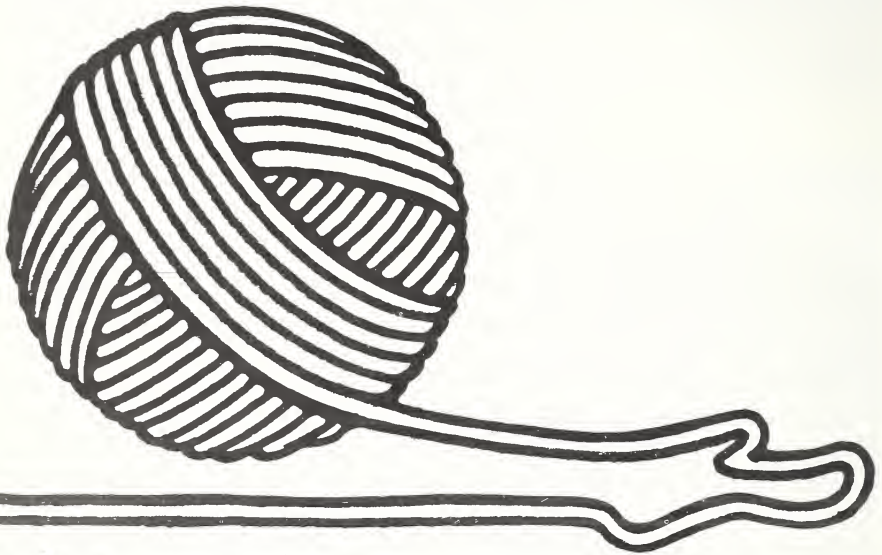
	Yes	No	No opinion
Inflation	93	4	3
Food exports	90	8	2
High farm costs	88	9	3
Food industry wages	82	12	4
Higher transportation costs	84	12	4
Government idled land	77	20	3
Government farm programs	76	19	5
Middleman profits	71	25	4
Unbalanced federal budget	67	27	6
More people to feed	67	29	4
Built-in food conveniences	67	29	4
Bad weather	66	31	3
Higher wages for farmworkers	65	30	5
Higher personal incomes	61	36	3
Low farm production	57	38	5
Food stamps	42	54	4
Power of farm organizations	39	55	6
Farm crop prices too high	35	61	4
People eating out more	29	67	4
Farm income too high	27	70	3

The general public's top five choices of ways to assure reasonable food prices are: cut government spending, restrict food exports, control corporation profits, remove all planting restrictions, and put ceilings on retail food prices.

Agriculture in General

Family farming is strongly endorsed by the American people with more than nine out 10 feeling that family type farming should be preserved. A similar proportion also feel that land should be reserved for food production.

A majority of Americans are concerned about air and water pollution, with young people 18 to 29 years old the most concerned about environmental problems, except for noise. Only 4 to 10 percent of the public regards dust from farm fields, smell of feedyards and farm pesticides as main sources of air pollution. Only 4 to 12 percent regard soil erosion from farms, manure and fertilizer runoff, and pesticides as main sources of water pollution.



THE TWINE BIND

Farmers in the United States may soon reach the end of their rope. A twine shortage looks likely for the 1974 haying season, since about 90 percent of the crop is baled, usually with baling twine.

Synthetics may be able to substitute for some natural fiber twine, but a trend to harvesting techniques that do not require tying, such as making haylage, cubing, loose hay, stacking, and rolling, may lower twine demand.

The impending twine shortage stems from a significant sisal production setback in East Africa—where extended poor growing conditions have existed for the past several years—and from a growing world demand for natural cordage fibers.

Although other major producers, Mexico and Brazil, increased output, world production in 1972 was still 3 percent short of the 1966-70 average, and 1973's output advanced only slightly to 1.37 billion pounds. The other basic twine material is henequen, and in 1973

about 353 million pounds were processed.

Sisal and henequen constitute the raw materials for almost all the natural fiber twine used in the United States. But sisal also has been promoted worldwide for wall and floor coverings, and increasing amounts of Mexican henequen have been processed into padding.

The tight supplies in the face of growing demand have depressed our twine imports. In 1973 the United States imported around 5 million 40-pound bales of baler twine, versus 6.3 million in 1972. The impact of the reduced 1973 imports are expected to hit during 1974's haying season.

Dollar devaluations and general world inflation have helped to lift raw sisal prices. During 1973 the price of African sisal rose 130 percent, and Brazilian sisal prices jumped 150 percent.

Such price hikes will likely reach the U.S. farm during 1974. While farmers paid an average of almost \$9 for a 40-pound bale last year, they'll likely pay \$16 to \$18 this year according to USDA economists.

Those prices could usher in synthetic twine. So far, polypropylene

twine has seen less use on the American farm because it costs too much. However, it looks likely that it will retail for around the same price as those projected for natural fiber twine.

Synthetic twine, however, now faces three drawbacks.

—It's made from petroleum, which is in tight supply and faces rising prices.

—The few manufacturers who make it have a limited capacity for production. They won't be able to expand in time to supply all the twine farmers will need in 1974.

—Synthetic twine imports are restricted. There has been some hesitation about liberalizing trade rules without safeguards to prevent total dependance on imports.

Another baling item, wire, may be short in some local areas—but no nationwide problem is foreseen. The 20 percent of the hay crop which is bound with wire is intended for commercial sale—the wire is needed for withstanding stresses, such as transportation, handling, and weather exposure.

FERTILIZE EFFECTIVELY

Cutbacks in natural gas deliveries to ammonia producers are going to mean somewhat lower nitrogen production in 1974.

This reduction, coming at a time when supplies are already tight and larger planted acreages seem likely, is going to put a premium on the wise use of fertilizer.

How can a farmer make sure he's getting the most out of his fertilizer inputs?

The best bet is still a soil test to determine how much of each element is needed on fields for maximum yields. Such tests will insure against applying scarce and expensive fertilizer on fields that don't need it.

But perhaps equally important in

1974 will be a careful appraisal by each farmer of the crop response to expect from applying fertilizer to various crops.

A good example is the question of how much nitrogen to apply on a field of soybeans compared with a field of corn when both show up the same on organic matter tests.

Agronomists indicate that the yield response of soybeans to fertilizer on soils already rich in organic matter is less than for corn on the same soil types. Consequently, farmers may wish to emphasize nitrogen application to corn, where there's more yield response in relation to money spent.

Farmers can also bolster their fertilizer's effectiveness by making sure of correct soil acidity levels.

Lime is a necessary ingredient for the action of the soil microorganisms which decompose plant residues—and thus release the nitrogen, phosphorus, and other nutrients found in large amounts in organic matter.

Lime also improves the activity of nitrogen bacteria which live on the roots of legume plants such as soybeans.

Farmers should not overlook the nutrient potential of crop residues and manure in this year of scant chemical fertilizer supplies.

Manure is not only a good nitrogenous fertilizer but also improves the soil's structure and tilth. A 3-year test in Wisconsin indicated that each ton of manure applied annually increased corn yields about 2 bushels an acre.

Residues such as leaves and stalks reduce fertilizer needs for several crops when returned to the soil.

For example, removing only corn ears, and plowing the stalks under, added about 15 pounds of phosphate and 60 pounds of potash to each acre in a Wisconsin study. However, agronomists there cautioned benefits from residues would vary, depending on the forage yield and how the residue was handled.

SURVEYSCOPE

To give our readers a clearer picture of the vast scope of SRS activities, Agricultural Situation presents a series of articles on special surveys undertaken in various States. While these are not national surveys, they are important to the agriculture in individual States.

To the pilot and the crew there was nothing especially remarkable about the flight from Hilo to Baltimore. But to Hawaii's papaya industry it marked a dream come true—for in the cargo compartment of the jumbo jet were a number of carefully packed crates of fresh Hawaiian papayas, picked less than 24 hours earlier from a clearing in a tropical rain forest and now ready for trucking to supermarkets in the Baltimore-Washington area.

Only a decade ago, anyone who wanted to eat a fresh papaya had to go to Hawaii or the West Coast to do it. The Aloha State produced virtually all

the Nation's commercial papaya crop—and also consumed about four-fifths of the Nation's papaya crop back in the days when the only feasible way of shipping fresh papayas to the Mainland involved a 3 or 4-day boat trip. The few shipments made to the Mainland were all along the West Coast.

But with the coming of the 747 and the DC-10, and their larger cargo compartments and faster flying time, (less than a day), Hawaiian marketers can fly fresh papayas to nearly any city on the Mainland. Outshipments from the State have shot up accordingly: reaching 17.4 million pounds, more



Detailed observations of Hawaii's papaya crop hopefully will allow SRS to develop . . .

than half of the 1973 crop, versus 3.2 million, one-fifth of the 1963 crop.

Hawaii's Papaya Administrative Committee, which assists in operating the Federal papaya marketing order, would like them to become as available in, say, Oklahoma as Oahu. And from a production standpoint, that's not an impossibility: Output during 1963-73 more than doubled, rising from 14.1 million to 32.6 million pounds. But bigger sales of fresh papayas to the Mainland also await the development of an efficient marketing system—and here's where SRS has been called upon to help.

The papaya is one of those fruits with a year-long growing season. At any one point in time, a single tree is likely to have fruit in all stages of growth: mature fruit ready for picking at the bottom, almost ripe fruit a little higher up, newly set fruit or blossoms at the very top.

Such a pattern of development makes it extremely difficult to estimate total production as well as when that

production will be realized. Both the when and how much of production are essentials for efficient marketing.

Hawaii's papaya industry has put up funds for a special research project. SRS statisticians are cooperating in the project to see if they can help develop ways of making accurate forecasts of production several months ahead of harvest.

Sixty scientifically selected papaya trees in Hawaii's Puna district are at the very heart of the SRS project.

Each week specially trained two-man teams are sent out to count the number of fruit set on each tree, observe fruit survival, sizes and growth rates, and the impact of certain weather variables on crop progress. Each week the teams are also called upon to harvest, grade, and weigh each mature fruit.

The statisticians are hopeful that the data gleaned from the sample trees will eventually provide the clues needed for accurate papaya production forecasts.



... ways of making accurate production forecasts several months ahead of harvest.

OUR GROW-IN-THE-DARK CROP

Drive south on U.S. 1 from Philadelphia. About 4 miles north of the Delaware line you'll enter one of the world's agricultural capitals.

Kennett Square, set among gently rolling eastern Pennsylvania hills, is to mushrooms what Omaha is to beef. Mushroom prices are frequently quoted f.o.b. Kennett Square.

The town sits in the heart of the Nation's mushroom belt, which is dominated by Pennsylvania's production. In the year ending June 30, 1973, the Keystone State produced 57 percent of the Nation's 254 million-pound mushroom crop.

The rest of the Nation's mushroom production is scattered mostly throughout 24 States.

America's only grown-in-the dark crop brought farmers \$110 million in 1972/73; Pennsylvania farmers got \$59 million of the total.

Since mushroom values are tallied on a fiscal year basis in contrast to calendar totals for most other crops, it's hard to compare them with other vegetables. However, their value falls between celery and onions. Celery earned farmers \$104 million

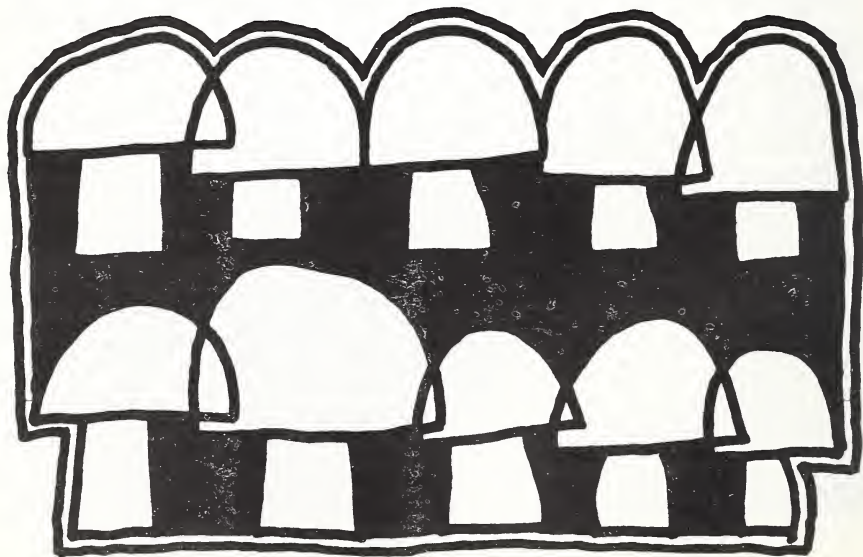
and onions \$140 million in calendar 1972.

Cash receipts to farmers from mushrooms have grown steadily from the \$53 million generated in 1966/67, the first year SRS started keeping tabs on the crop. The price per pound to farmers, however, took a dive last mushroom year, due to increased domestic production and stiff competition from imported canned mushrooms.

Clean stock for canning prices ran between 35 and 42 cents per pound during 1972/73, compared to between 41 and 48 cents per pound during the previous year. So far during the 1973/74 year, prices have run between 30 and 35 cents per pound.

Canners bought \$67 million worth during 1972/73, while \$43 million worth were sold fresh.

There's no such thing as mushroom acreage. Farmers measure their crop in square feet. They cultivated an estimated 102 million square feet in 1972/73, 9 percent more than the previous year. As of August 1973, farmers planned to increase footage by 11 percent.



Breakthrough!

CORN: HOW SWEET IT IS

Unless they have a steaming ear of sweet corn or a bag of popcorn in front of them, most people not directly involved with producing or marketing corn seldom think about it.

Corn is a basic food for livestock and for humans. And so many non-food products contain corn starch that some fabric, paper, or object made with it is always close at hand.

Now, thanks to what USDA economists term a technical breakthrough, we may soon be consuming corn in large quantities in yet another form—and how sweet it is.

USDA economists say the conversion of dextrose into fructose has made possible a new product—high fructose corn sirup—which could effect far-reaching changes in the market for industrial sweeteners.

What's more, they say that in the not-too-distant future the average consumer could be finding the new high fructose sirup in practically every food in which liquid cane or beet sugar is now used.

The production of a corn sirup equal to cane or beet sugar in sweetness has long been a research goal of the corn wet milling industry. In 1965 a U.S. firm learned that the Japanese had found a way to do it.

Their process utilized an enzyme to convert dextrose into fructose, or levulose. Several sirup products were subsequently developed in the United States, including one intended primarily for use in soft drinks.

As additional refinements were

made, the high fructose sirup emerged as a low-cost, easy-to-handle substitute for liquid sucrose.

Its advantages are substantial. It is water white, meaning it will not impart any more color to the end product than sugar, and its low viscosity makes it easy to store and handle. It also possesses no unique taste of its own other than sweetness. Nationwide, the cost of high fructose sirups is reportedly about 10 percent below that of sugar.

In 1972 estimated refined sugar deliveries in the United States totaled 10.7 million tons. The beverage industry alone uses 2.5 million tons of sugar annually, and it is here that the high fructose sirups are beginning to make their mark.

The sirup is now being commercially used as the total sweetener in a number of carbonated soft drinks, including colas, root beer, and fruit flavored beverages.

Compared with cane and beet sugar, however, production quantities are still relatively small. Industry sources estimate that current production of the new corn sirup is equivalent to about 175,000 tons of sugar on a dry basis.

Many observers predict that a substantial increase in the use of the high fructose sirup will not be long in coming since cost-conscious food processors are eager to substitute a less expensive but equally effective product for sugar.

During the first quarter of 1973, for example, corn sirup shipments for food use totaled 387,000 tons (dry basis), up nearly a fifth from the year before. Apparently part of the increase consisted of high levulose type corn sirup, which first became available in commercial quantities during 1972.

Briefings

RECENT REPORTS BY USDA OF ECONOMIC, MARKETING, AND RESEARCH DEVELOPMENTS AFFECTING FARMERS.

TRADE BALANCE IN BLACK . . . The first favorable balance of trade in 3 years for the U.S. was brought about largely by a record surplus in agricultural trade. 1973's agricultural trade surplus of \$9.3 billion wiped out a deficit of \$7.6 billion in nonagricultural shipments, leaving an overall trade surplus of \$1.7 billion. Agriculture's contribution was built on the sale of \$17.7 billion worth of U.S. farm products abroad, against U.S. foreign farm imports of \$8.4 billion.

RECORD FUTURES . . . Futures trading sailed on to establish more new records last year. The 1973 total annual volume of 18.6 million contracts worth an estimated \$329.1 billion was the fifth straight high since 1969, according to USDA. Last year's transactions represented a 30% increase over 1972 while the value soared 82%, reflecting the sharp rise in volume and commodity prices. Here's a rundown of the 10 most active items on regulated commodity exchanges last year, listed in order of trading volume.

Commodity	Contracts traded in 1973	Change in trading volume from 1972
	<i>Million</i>	<i>Percent</i>
Corn	4.2	+110
Soybeans	2.8	-32
Live cattle	2.6	+87
Wheat	2.2	+69
Soybean oil	1.8	+59
Frozen pork bellies	1.2	-44
Live hogs	1.1	+96
Potatoes	.7	+271
Soybean meal	.6	+5
Eggs	.6	+30

WHEAT NOTES . . . A record pace of exports and prospects of unusually small wheat stocks are pushing wheat prices at the farm to record levels. USDA economists expect farm prices for the 1973/74 marketing year to average around \$3.90 a bushel, up from \$1.76 in 1972/73.

STOCKS DROP . . . Total wheat use in 1973/74 is expected to approach 2.0 billion bushels, well ahead of 1973's 1.7 billion bushel crop, which will cause old-crop stocks next July to be around 178 million bushels. This would be the second year in a row that stocks have been cut in half. However, supplies of 1974-crop wheat harvested in June should ease the pressures on what is shaping up as the smallest carryover in 27 years. In addition, some purchases of 1973-crop wheat for export have been deferred and quotas on U.S. imports of wheat have been temporarily lifted.

COTTON EXPORTS . . . Two shortages, one of shipping space and the other of bunker oil, threaten to cut into U.S. cotton exports in 1973/74, industry sources have told USDA. The record-large quantities of products awaiting export have already strained transportation facilities . . . and this problem is being further aggravated by the tight worldwide supply of bunker oil. Some ports are supplying vessels with only enough fuel to reach the next port of call while in other cases the ships can't get any oil at all. Some U.S. vessels are now sailing only when they can carry enough bunker oil for their return journey . . . and the extra fuel limits their freight capacity. Though over 6.5 million bales of cotton are still scheduled to be shipped out during the remainder of the marketing year, industry sources express doubt that exports will even reach the current USDA estimate of approximately 5.7 million bales.

FERTILIZER FACTS . . . More fertilizer is expected to be produced this year than last . . . though farmers still may not be able to get all they need. 1974 supplies are expected to be up 8% for both nitrogen and phosphates and 5% for potash. But the prospective large increase in crop acreage plus the likelihood of continued strong demand for farm output at relatively high prices are precursors of heightened fertilizer use—perhaps as much as 27 million tons this spring. Consequently, USDA economists see fertilizer continuing under intensive demand and price pressures. Prices of fertilizers with a high nitrogen content may shoot up 50% this spring over a year earlier, while phosphates may be up 40% and potash 20%. In all, the 1974 fertilizer bill for U.S. farmers may reach \$4 billion, nearly 40% over 1973.

LAND VALUE LEAP . . . The index of farm real estate values shot up 21% in the year ended November 1, 1973, the second highest 12-month increase ever. Only the 22% upswing recorded over 5 decades ago topped last year's gain, according to USDA economists. Colorado led all the States with a 33% hike, followed by Pennsylvania with 31% and South Carolina, Alabama, and Iowa, each with 30%. Louisiana reported the lowest rate of gain, 10%. Interestingly, that "lowest" rate last year was still well above the 7% annual increase for all States chalked up during the entire March 1963-March 1973 decade. Record high net farm income, optimism regarding the future of U.S. agriculture, and increased availability of mortgage funds undoubtedly served as stimuli for 1973's spurt in farmland values.

WHAT'S AHEAD? . . . For the 12-month period ended this March 1, USDA economists expect land values to have gone up just about as much as recorded last November, but after that they foresee some slackening in the rate of gain. Given the following expectations for 1974—prices paid by farmers rising faster than prices received, virtual elimination of farm program payments, recovery of world food production and consequent falling off in demand for U.S. exports, and a less expansive monetary policy—farm real estate prices will rise less rapidly during the rest of 1974.

AQUA AMMONIA . . . Farmers might be able to save 5 cents a bushel—\$150 to \$175 million a year—if they could treat corn for animal feeds with aqua ammonia rather than drying it or treating it with acids, according to USDA. There might be other pluses, too: Aqua ammonia could increase the feeding value by adding nonprotein nitrogen while lessening artificial drying, thus reducing the energy needed to run farm dryers. However, USDA states that further testing is necessary before aqua ammonia treatments can actually be recommended.

ASTROMOTHS . . . USDA scientists were excited about the premature hatching of several gypsy moth eggs aboard the Skylab space station last December. The eggs weren't scheduled to have hatched for another couple of months but it's just possible the zero gravity curtailed the moths' normally long hibernation period. The scientists are looking for some sort of a breakthrough in speeding up the gypsy moth's life cycle—it normally takes about a year to raise a single generation—so they can launch a massive control program using sterile males. Gypsy moths have defoliated 1-1/2 to 2 million acres of forest annually for the past 3 years in the Northeast and now threaten to move south and west.

Statistical Barometer

Item	1972	1973	Latest available data	
Prices:				
All prices received by farmers (1967=100)	126	172	200	January 1974
Crops (1967=100)	115	164	211	January 1974
Livestock (1967=100)	134	178	191	January 1974
All prices paid by farmers (1967=100)	123	145	157	January 1974
Ratio ¹ (1967=100)	100	118	127	January 1974
Consumer price index, items (1967=100)	125	133	138	December 1973
Food (1967=100)	124	141	151	December 1973
Farm Income:				
Volume of farm marketings (1967=100)	112	110	---	
Cash receipts from farm marketings (\$bil.)	60.7	83.4	101.2	4
Realized gross farm income (\$bil.)	68.9	90.5	108.3	4
Production expenses (\$bil.)	49.2	64.4	77.9	4
Realized net farm income (\$bil.)	19.7	26.1	30.4	4
Income and Spending:				
Disposable personal income, total (\$bil.)	797.0	882.6	918.0	4
Expenditures for food (\$bil.)	125.0	139.0	145.4	4
Share of income spent for food (percent)	15.7	15.8	15.8	4
Farm Food Market Basket:²				
Retail cost (1967=100)	121	142	153	December 1973
Farm value (1967=100)	124	164	171	December 1973
Farmer's share of retail cost (percent)	40	45	43	December 1973
Farm Production and Efficiency:				
Farm output, total (1967=100)	112	116 ³	---	
Livestock (1967=100)	108	107 ³	---	
Crops (1967=100)	113	119 ³	---	
Cropland used for crops (1967=100)	89	104 ³	---	
Crop production per acre (1967=100)	115	114 ³	---	
Farm inputs, total (1967=100)	102	104 ³	---	
Farm output per unit of input (1967=100)	110	112 ³	---	
Farm Real Estate:				
Average value of land per acre, Nov. 1 (\$)	233	280	---	January 1974
Total value of farm real estate, Nov. 1 (\$bil.)	244.7	293.0	---	January 1974
Livestock and Poultry Inventory:				
Meat animals (1967=100)	107	109	114	February 1974
Milk cattle (1967=100)	87	86	84	February 1974
Poultry (1967=100)	97	93	95	February 1974
Agricultural Trade:				
Agricultural exports (\$bil.)	9.4	17.7	---	
Agricultural imports (\$bil.)	6.5	8.4	---	

¹Ratio of index of prices received by farmers to index of prices paid, interest, taxes, and farm wage rates.

²Average quantities per family and single person households bought by wage and clerical workers, 1960-61, based on Bureau of Labor Statistics figures.

³Preliminary.

⁴Annual rate, seasonally adjusted, fourth quarter.

AGRICULTURAL SITUATION

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